ZEN GLOBAL

'the power *of* insight'

User Guide

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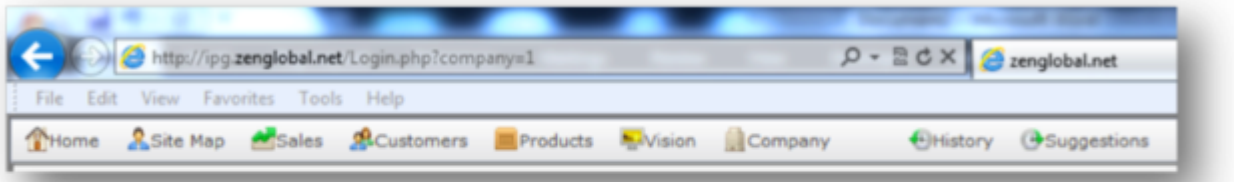
ZEN GLOBAL – HOME SCREEN
MENU BAR

The MENU BAR is located across the top of your browser

GETTING TO KNOW YOUR MENU CATEGORIES:



HOME Select to return you to the Welcome Screen. Select **STATISTICS** to view a snapshot of your database

SALES Contains **SALES REPORTS** for both non-loyalty and loyalty transactions

CUSTOMERS This menu tab is your most frequently used;

MAINTENANCE contains your company information.

LOYALTY maintains, reports and communicates to loyalty.

MARKETING maintains and communicates to non-card holders.

VOUCHERS maintain and report on vouchers.

COMPANY Contains your Zen parameters. Main menu tabs you will use are;

1.**COMPANY MAINTENANCE**, **BATCH REPORT** to view scheduled emails/SMS

2. In **USERS** select **PORTAL USERS** to create username and passwords

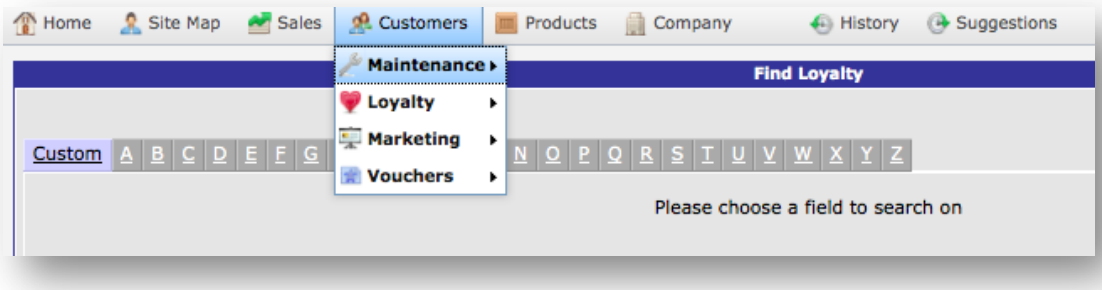
HISTORY Records your current sessions movements

SUGGESTIONS
A 'learning area' – displays the most used functions

#To the right of **SUGGESTIONS** the two most visited functions in your current session will be displayed

? HELP KEY
The icons found immediately to the left of the Help key, will be the print or download functions when viewing reports

CUSTOMERS MENU



SUB MENU CATEGORIES IN THE CUSTOMERS TAB ARE:
MAINTENANCE, LOYALTY, MARKETING AND VOUCHERS
As a user, the main sub category you will use is LOYALTY to manage, communicate and report on members.

LOYALTY

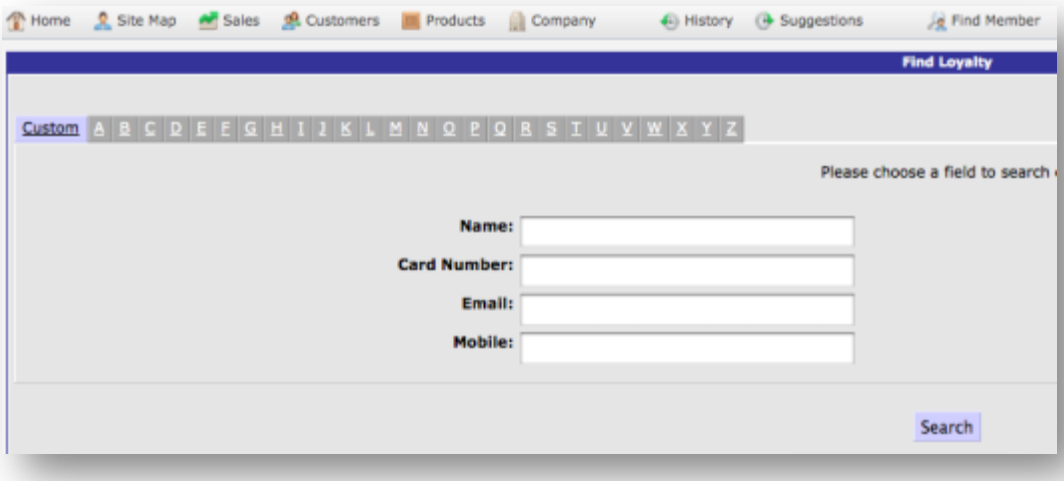
SUB MENU ITEMS WITHIN THE LOYALTY MENU YOU WILL FREQUENTLY VISIT:
Within the loyalty menu there are a number of areas, which can be ignored by the general user.
The main sub categories you will visit for membership related tasks are:

- ⇒ GENERAL MAINTENANCE – **PROCESS LOST CARD**
- ⇒ CARD MAINTENANCE – **FIND MEMBER** and **NEW CARD**
- ⇒ LOYALTY REPORTS – Use this menu to view a series of loyalty based reports
- ⇒ SMS OUT – Where you send and report on loyalty **SMS** campaigns
- ⇒ EMAIL OUT - Where you send and report on loyalty **EMAIL** campaigns

MANAGING YOUR DATABASE

FIND A MEMBER

MENU NAVIGATION: CUSTOMERS ⇒ LOYALTY ⇒ CARD MAINTENANCE ⇒ FIND MEMBER



Search for a member by using the 4 options; **NAME**, **CARD NUMBER**, **EMAIL** or **MOBILE**.
***Searching by name:** You must use a minimum if 4 characters when using this field

Use the alphabetical tabs in **CUSTOM** to list all members individual letter

HINT: If searching for a common surname, enter the surname and first initial (eg smith,b)

UPDATING MEMBER DETAILS

MENU NAVIGATION: CUSTOMERS ⇒ LOYALTY ⇒ CARD MAINTENANCE ⇒ FIND MEMBER ⇒SELECT YOUR MEMBER

Once you select the name of the customer you wish to update, the edit box will appear with a series of tabs. All items with a red (*) need to be complete or filled in with a N/A for the record to save.

Click **ADD/UPDATE** to save the details before moving to the next tab.

When the record has been updated correctly, the following will appear under the top menu bar:

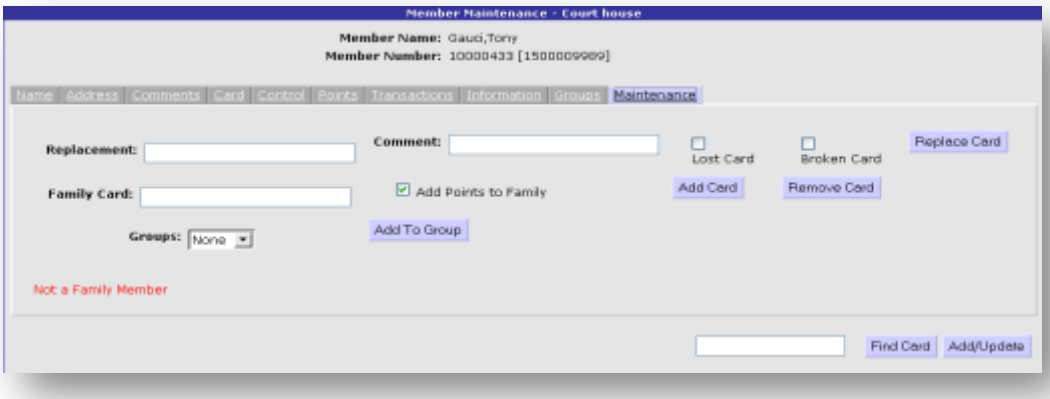
The Member Detail was Successfully Added / Updated
The Member Loyalty Detail was Successfully Added / Updated
Extra Member Loyalty Detail was Successfully Added / Updated

Several tabs control member information. The following are **HINTS** for specific tab:

1. **CARD TAB -** Ignore the **POINTS RULE, CARD ACTIVE** and **DESCRIPTION FIELDS**
2. **CONTROL TAB -** Leave fields as is unless member has opted out via a manual app form, then update
3. **POINTS TAB - POINTS PER, REDEEMED POINTS** and **DISCOUNT** is not to be altered
4. **TRANSACTIONS TAB -** Select a specific date from **DATE** column to view members individual transactions

CARD REPLACEMENT AND DATA MERGES

MENU NAVIGATION: FIND MEMBER ⇒ MAINTENANCE TAB within the selected member record



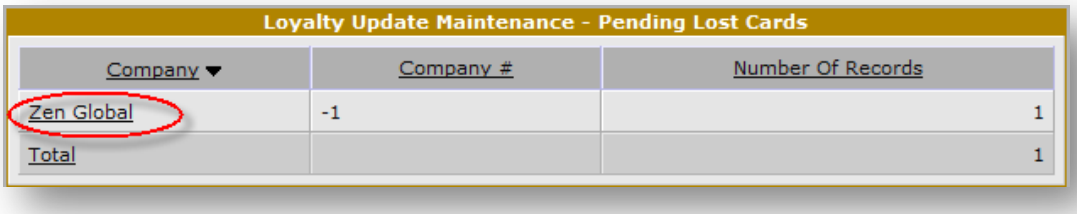
FOLLOW THESE STEPS TO TRASNFER MEMBER DATA AND POINTS TO A NEW CARD:

STEP 1 Enter the new card number in the **REPLACEMENT** field

STEP 2 Click **REPLACE CARD**. A confirmation pop-up box will appear, select **OK**

STEP 3 **NAVIGATE:** CUSTOMERS ⇒ LOYALTY ⇒ GENERAL MAINTENANCE ⇒ PROCESS LOST CARD

STEP 4 In **PROCESS LOST CARD**, click your venues name in the **COMPANY** column



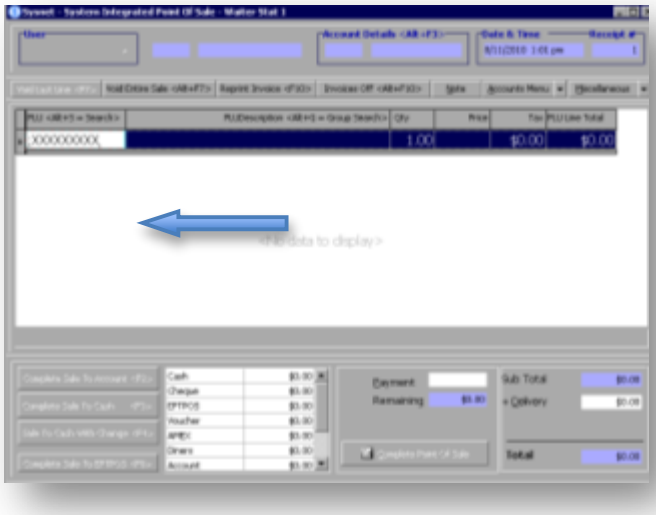
When the process is complete, the following green text will appear at the top of the screen:
Processing Lost Cards Complete

MEMBER POINTS ADJUSTMENTS

POINTS ADJUSTMENTS MUST BE DONE THROUGH SYSNET SiPOS NOT YOUR ZEN PORTAL

STEP 1 Open SiPOS from your Sysnet dock

STEP 2 Click inside the PLU box and type a semi colon (;) followed by the card number. E.g. ;61805642598. Then select the **ENTER** key on your keyboard.



STEP 3 The member name will now appear at the top in the **MEMBER SECTION**

STEP 4 Click back in the PLU box, press **ALT + S** to search for a PLU.
Look up and enter PLU called **POINTS ADJUSTMENT**

STEP 5 Enter the amount of points in the **QTY** column
NOTE: Place a minus sign (-) in front of the quantity to remove points

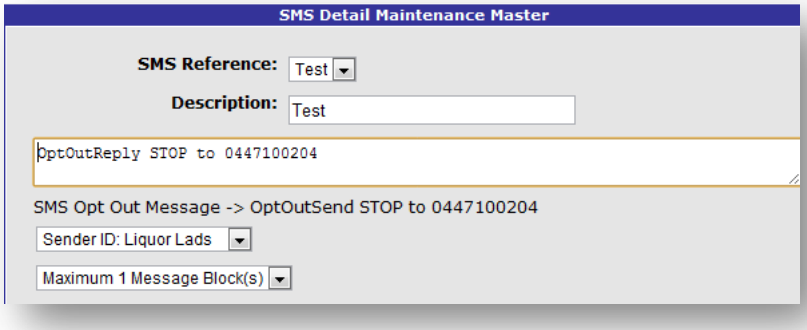
STEP 6 Click **COMPLETE SALE TO CASH** to complete the process

COMMUNICATE TO YOUR DATABASE

SMS – CREATE YOUR MESSAGE

MENU NAVIGATION: CUSTOMERS ⇒ LOYALTY ⇒ SMS OUT ⇒ EDIT

STEP 1 A pre existing SMS message will open, select **NEW** found at the bottom right of the screen to start
STEP 2 In the **DESCRIPTION** field title your SMS for your reference
STEP 3 Enter your message before the <<STOP>>
DO NOT remove the <<STOP>> this is the automated opt out required for privacy
STEP 4 Select **SAVE** to complete the process

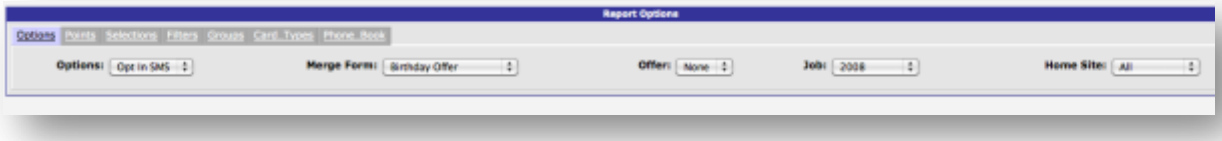


SMS – SEND YOUR MESSAGE

MENU NAVIGATION: CUSTOMERS ⇒ LOYALTY ⇒ SMS OUT ⇒ GENERATE

*Otherwise if you are in the SMS Edit screen, select **GENERATE** found at the bottom right

STEP 1 Once **GENERATE** is clicked, the screen below will appear and the following needs to be selected from the drop down boxes across the screen:



Options: Opt in SMS
Merge Forms: Reference name of the SMS you wish to send
Job Number: Select **NEW JOB.** Using an old job number will resend a past message
Site: Leave **ALL** or select your venue from the drop down list

You can then target specific members by using the **POINTS, SELECTIONS, FILTERS, GROUP** and **CARD TYPE** tabs found at the top right. Eg: **SELECTIONS** tab can be used to select birth months

STEP 2 Click **CALCULATE** to proceed to the send screen. Screen example below:

SEND SMS NOW: Select the 2nd **ACTION** icon (hovering over this will either display **SEND NOW** or **MERGE SELECTION**) Selecting this action sends SMS then and there, it can not be reversed

SEND SMS LATER: Select the 3rd **ACTION** icon (hovering over this it will either display **SEND LATER** or **BATCH MERGE SELECTION**) A new screen will appear where you enter time and date for the send.

***SMS - NOTES:** *1. Zen SMS clock works on Australian Eastern Standard time*
2. By not selecting a date and time the SMS will automatically be sent the following day at 3am

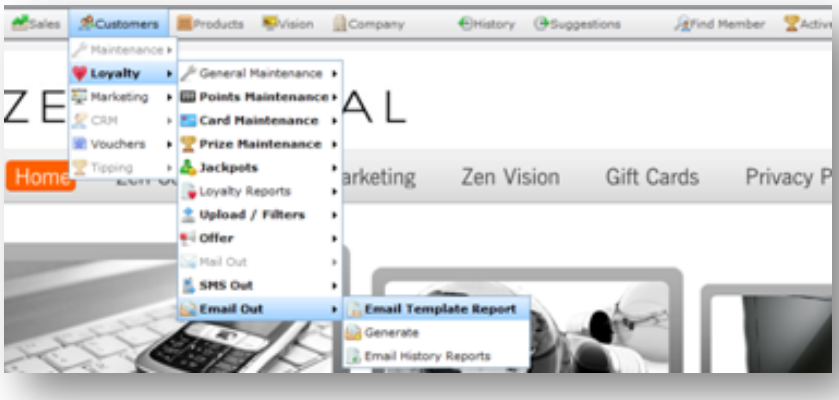
SMS – REPORT ON SENT CAMPAIGNS

MENU NAVIGATION: CUSTOMERS ⇒ LOYALTY ⇒ SMS OUT ⇒ SMS REPORTS

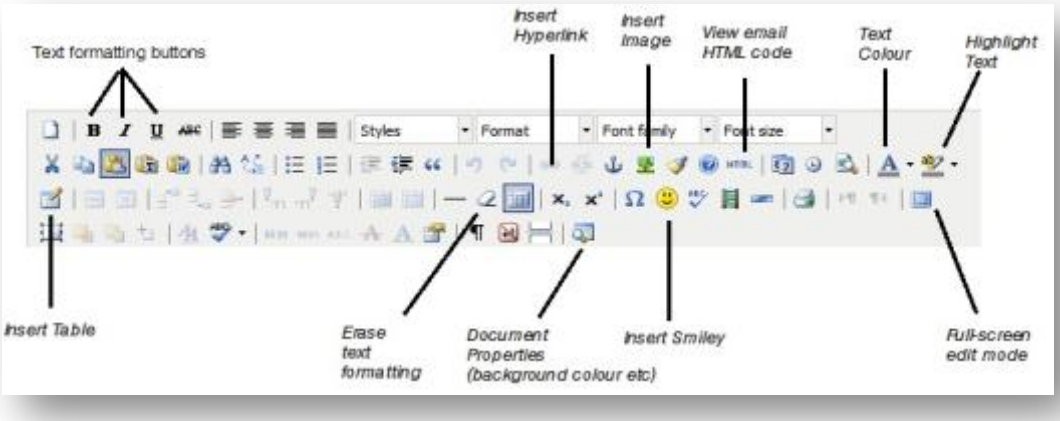
Select your **DATE** range to display all sms campaigns sent

EMAIL – CREATE YOUR EMAIL

MENU NAVIGATION: CUSTOMERS ⇒ LOYALTY ⇒ EMAIL OUT ⇒ EMAIL REPORT/TEMPLATE REPORT



This lists the email templates saved. Select the template you wish to use by clicking the **TEMPLATES NAME.** This will then open the email editor screen.



STEP 1 Rename your email within the **DESCRIPTION** field at the top

STEP 2 Enter the tagline into the **SUBJECT LINE** field then select **SAVE/SAVE EMAIL**

STEP 3 Now you can design your email using the editor functions

STEP 4 **SEND YOUR EMAIL** – Follow the same process as **SMS SEND** detailed before

HINT: To duplicate an email design select the **HTML** button, copy all contents, then select **NEW** found to the bottom right of the screen, select the **HTML** button and delete all contents and paste. This will also duplicate the email. Then enter the details and save.

ADDITIONAL USEFUL EMAIL TOOLS:
1. Click **MERGE TAG** found at the bottom right of the screen to view codes that can be implemented into your email content (e.g. customers name/points balance)
2. Once you have **SAVED** your email select **EVALUATE** to display the final emails appearance
3. When editing text, type first then: format in this order: Colour, Family then size last

EMAIL – REPORT ON SENT CAMPAIGNS

MENU NAVIGATION: CUSTOMERS ⇒ LOYALTY ⇒ EMAIL OUT ⇒ EMAIL HISTORY REPORTS
Select your **DATE** range to display all email campaigns sent

BATCH REPORTS – VIEW SCHEDULED EMAILS AND SMS

MENU NAVIGATION: COMPANY ⇒ COMPANY MAINTENANCE ⇒ BATCH REPORT
Select your **SITES** as **ALL,** select **DATE** range and your **OPTIONS: PENDING, PROCESSED, ALL** or **AUDIT** to display scheduled and past email and sms sends

IMAGE AND ATTACHMENT UPLOAD

MENU NAVIGATION: CUSTOMERS ⇒ LOYALTY ⇒ UPLOADS & FILTERS ⇒ IMAGE UPLOAD

STEP 1 Select the image using the **BROWSE** tool then select **UPDATE**
STEP 2 Once image is uploaded, the image title will appear above the browse box

To view the **IMAGE GALLERY**, select **IMAGE REPORT.** The same process applies when uploading PDF's expect using the **ATTACHMENT UPLOAD** and **ATTACHMENT REPORT** menu tabs found in **UPLOADS/ FILTERS.**

TRACKING TRANSACTIONS

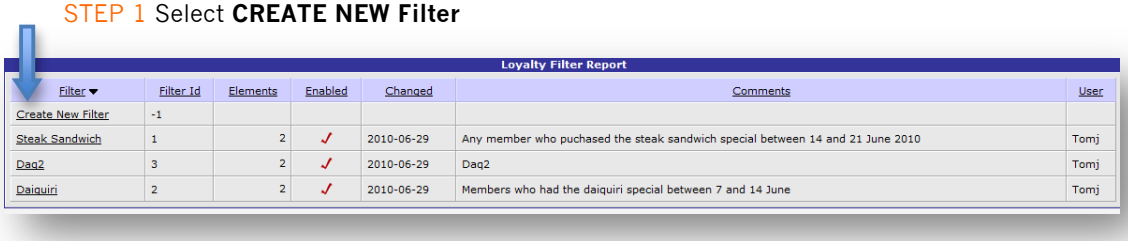
FILTERS

MENU NAVIGATION: **CUSTOMERS ⇒ LOYALTY ⇒ UPLOADS/FILTERS ⇒ FILTERS**

Filters narrow down purchases of specific products, revenue groups, and particular time periods

CREATE A FILTER

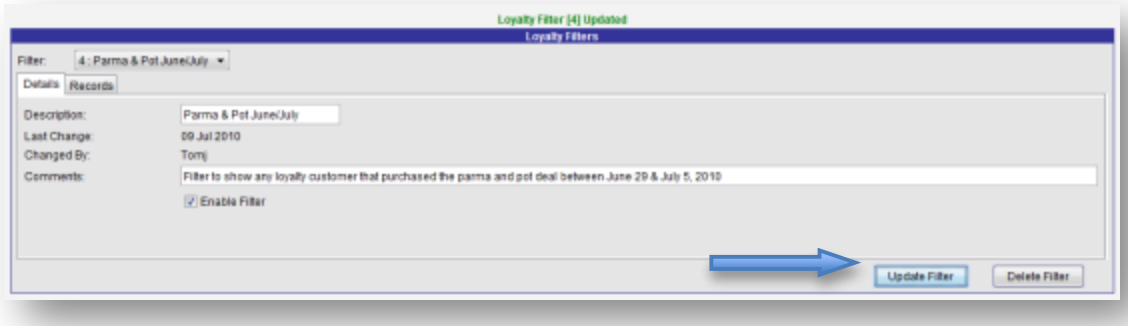
STEP 1 Select **CREATE NEW Filter**



Loyalty Filter Report

Filter	Filter Id	Elements	Enabled	Changed	Comments	User
Create New Filter	-1					
Steak Sandwich	1	2	✓	2010-06-29	Any member who puchased the steak sandwich special between 14 and 21 June 2010	Tomj
Daq2	3	2	✓	2010-06-29	Daq2	Tomj
Daiquiri	2	2	✓	2010-06-29	Members who had the daiquiri special between 7 and 14 June	Tomj

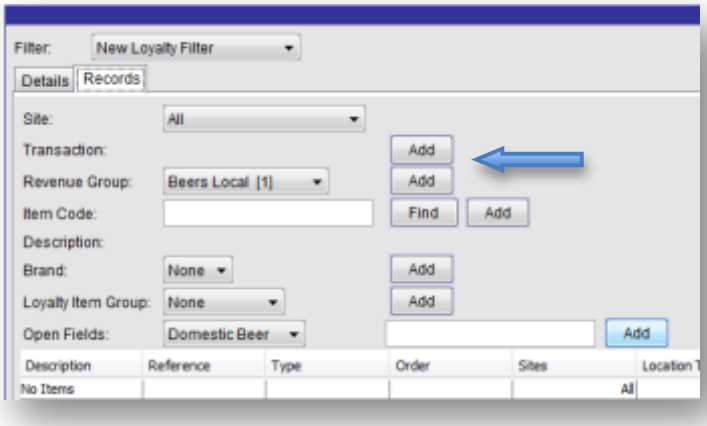
STEP 2 In the **DESCRIPTION FIELD** title the filter. In the **COMMENTS** field briefly describe what the filter will be doing. Then select **UPDATE FILTER**. Now select Records to set the tracking.



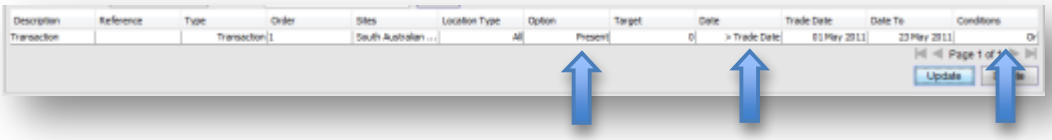
TRANSACTION FILTERING

Find any member that has transacted within a specific time period.

STEP 1 Select the **ADD** button next to **TRANSACTION**



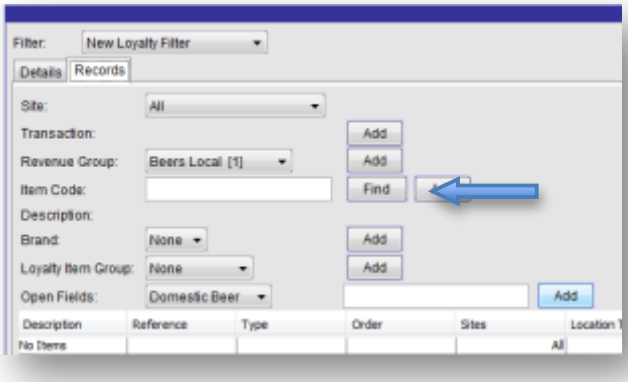
STEP 2 Within the bottom table, **OPTION** column, change to **PRESENT**, then select a **DATE** range and lastly change the **CONDITIONS** column to **AND.** Select **UPDATE** to complete



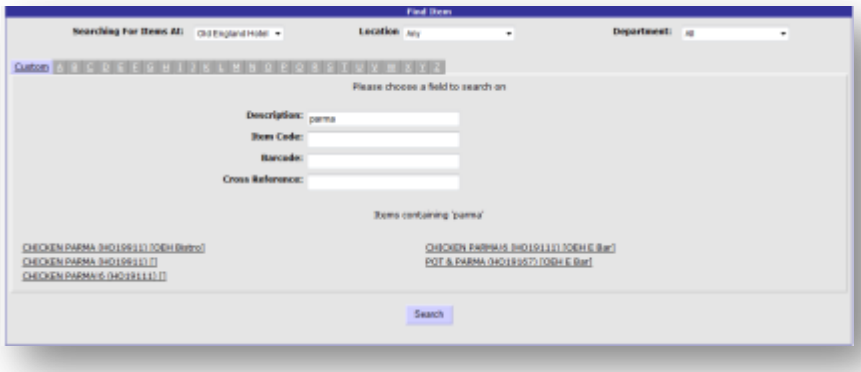
SINGLE PRODUCT FILTERING

Find a member that has purchased a particular product. First step is to locate the products PLU.

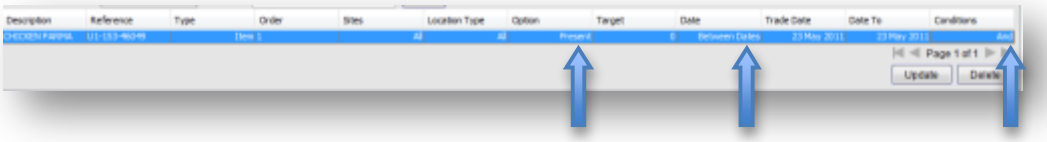
STEP 1 Select the **FIND** button next to **ITEM CODE** and search for the product



STEP 2 Select the product, then press **ADD** found next to the **FIND** button



STEP 3 Within the bottom table, **OPTION** column, change to **PRESENT**, then select a **DATE** range and lastly change the **CONDITIONS** column to **AND.** Select **UPDATE** to complete



MULTIPLE PRODUCT FILTERING

MENU NAVIGATION: CUSTOMERS ⇒ LOYALTY ⇒ UPLOADS/FILTERS ⇒ ITEM GROUP REPORT

STEP 1 Select **CREATE NEW ITEM GROUP**

STEP 2 Name your item group in the **DESCRIPTION** field and press **SAVE**

STEP 3 Navigate back to **ITEM GROUP REPORT**, select created item group and click **SHOW ITEMS**

STEP 4 Click **ADD ITEM.** Search item and tick box to select item(s), press **ADD SELECTED ITEMS**

STEP 5 Navigate back to **FILTERS** and select your filter. Within the filter select the **RECORDS** tab

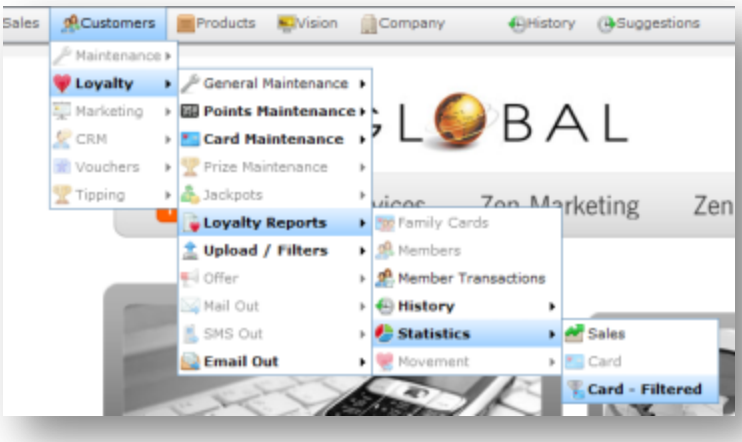
STEP 6 Within the **LOYALTY ITEM GROUP** drop down list, select your item group and click **ADD**

STEP 7 **OPTION** column, change to **PRESENT**, select a **DATE** range and change the **CONDITIONS** column to **AND.** Select **UPDATE** to complete

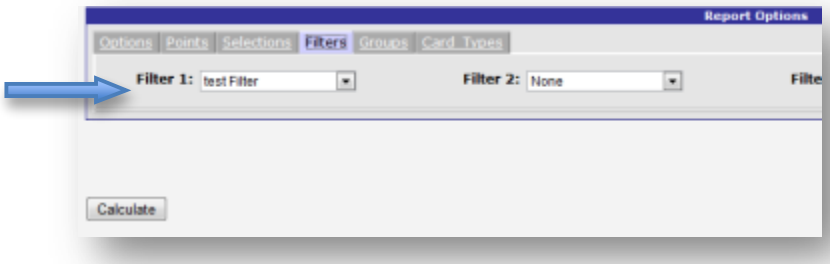
RUN A FILTER

There are two options to run a filter;

1. Click **RUN FILTER** found bottom corner of your created filter details or 2. Manually through reports
MENU NAVIGATION: CUSTOMERS ⇒ LOYALTY ⇒ LOYALTY REPORTS ⇒ STATISTCS ⇒ CARD - FILTERED



STEP 2 Select the **FILTERS** tab, and in **FILTER 1:** select filter from drop down list, click **CALCULATE**



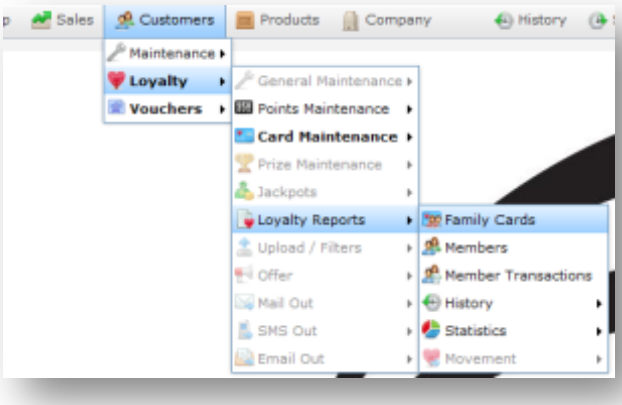
STEP 3 Select the **DOWNLOAD** action icon for a spreadsheet or **VIEW** icon to display on screen

NOTE: Filters are also available within Email and SMS generate screens

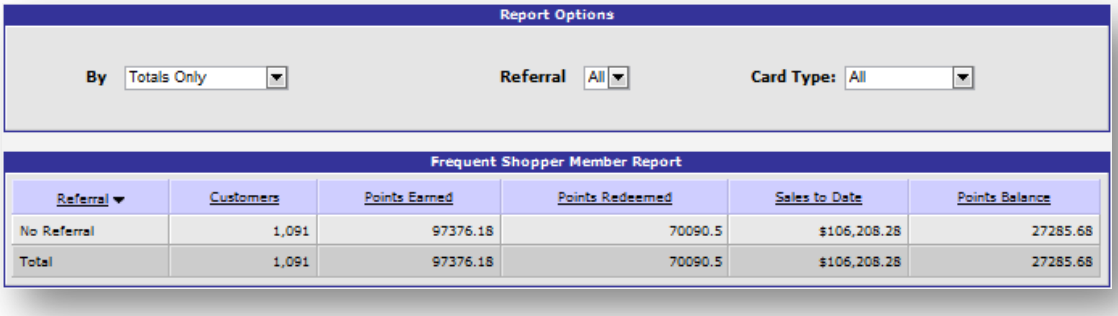
LOYALTY REPORTS

SUB MENU ITEM FOUND UNDER LOYALTY:
MENU NAVIGATION: **CUSTOMERS ⇒ LOYALTY ⇒ LOYALTY REPORTS**

MEMBERS REPORTS

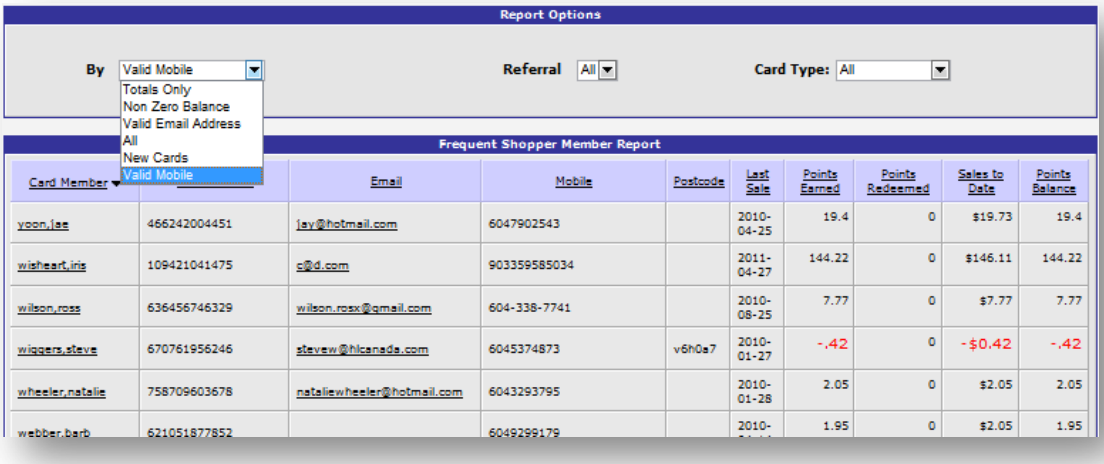


The MEMBERS REPORT displays the size of the membership database



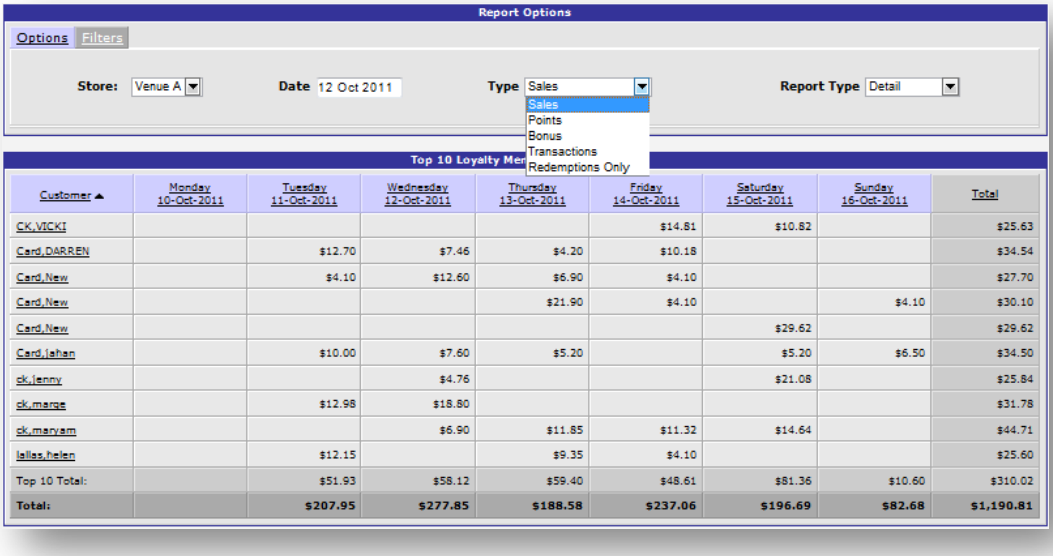
Referral	Customers	Points Earned	Points Redeemed	Sales to Date	Points Balance
No Referral	1,091	97376.18	70090.5	$106,208.28	27285.68
Total	1,091	97376.18	70090.5	$106,208.28	27285.68

The drop down box allows the selection to be changed and expands the report from consolidated to display individual members



Card Member		Email	Mobile	Postcode	Last Sale	Points Earned	Points Redeemed	Sales to Date	Points Balance
yoon,jae	466242004451	jay@hotmail.com	6047902543		2010-04-25	19.4	0	$19.73	19.4
wisheart,iris	109421041475	c@d.com	903359585034		2011-04-27	144.22	0	$146.11	144.22
wilson,ross	636456746329	wilson.rosx@gmail.com	604-338-7741		2010-08-25	7.77	0	$7.77	7.77
wiggers,steve	670761956246	stevew@hlcanada.com	6045374873	v6h0a7	2010-01-27	-.42	0	-$0.42	-.42
wheeler,natalie	758709603678	nataliewheeler@hotmail.com	6043293795		2010-01-28	2.05	0	$2.05	2.05
webber,barb	621051877852		6049299179		2010-	1.95	0	$2.05	1.95

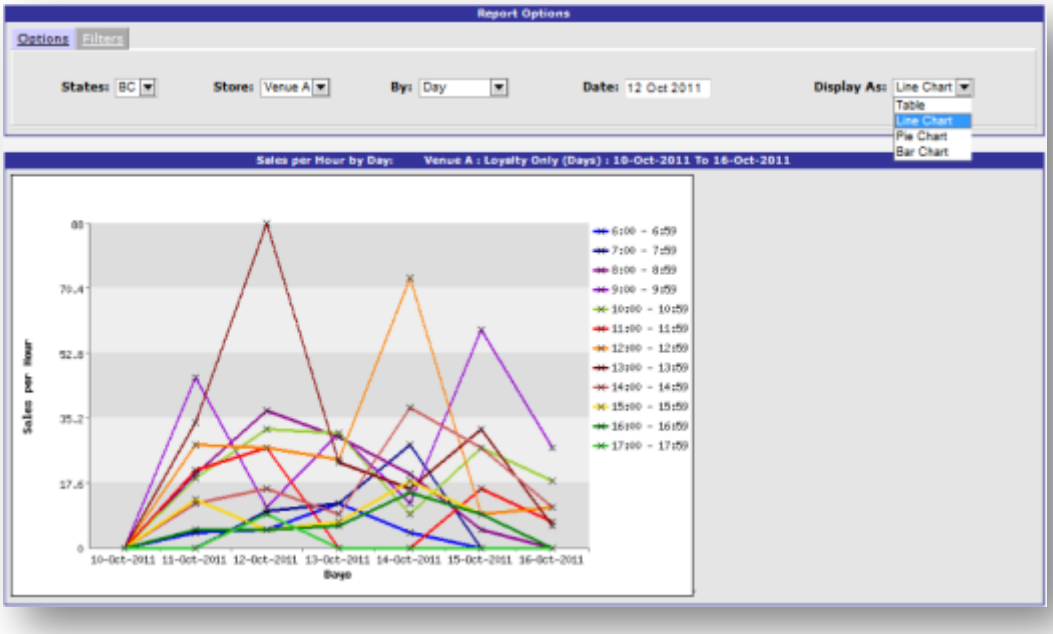
The MEMBER TRANSACTIONS REPORT displays which members transact on specific days. Displayed as sales, points earned, bonus points earned, transactions, or points redeemed.



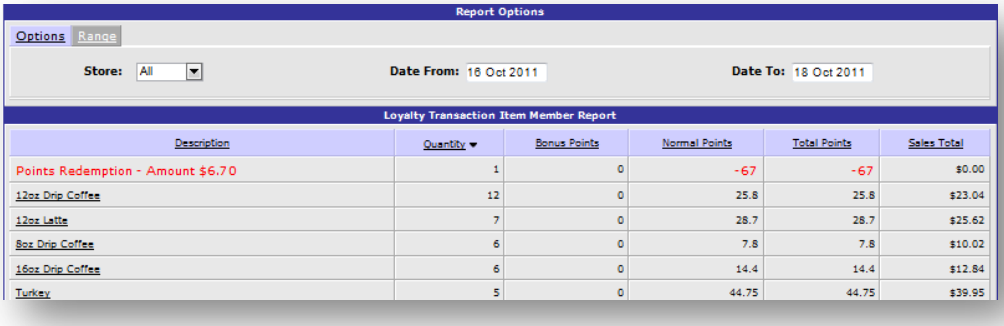
Customer ▲	Monday 10-Oct-2011	Tuesday 11-Oct-2011	Wednesday 12-Oct-2011	Thursday 13-Oct-2011	Friday 14-Oct-2011	Saturday 15-Oct-2011	Sunday 16-Oct-2011	Total
CK,VICKI					$14.81	$10.82		$25.63
Card,DARREN		$12.70	$7.46	$4.20	$10.18			$34.54
Card,New		$4.10	$12.60	$6.90	$4.10			$27.70
Card,New				$21.90	$4.10		$4.10	$30.10
Card,New						$29.62		$29.62
Card,lahan		$10.00	$7.60	$5.20		$5.20	$6.50	$34.50
ck,jenny			$4.76			$21.08		$25.84
ck,marge		$12.98	$18.80					$31.78
ck,maryam			$6.90	$11.85	$11.32	$14.64		$44.71
lallas,helen		$12.15		$9.35	$4.10			$25.60
Top 10 Total:		$51.93	$58.12	$59.40	$48.61	$81.36	$10.60	$310.02
Total:		**$207.95**	**$277.85**	**$188.58**	**$237.06**	**$196.69**	**$82.68**	**$1,190.81**

HISTORY REPORTS

TIME HOUR REPORT same as in the sales reports, but can be narrowed down to display only loyalty sales as well as the sites total sales



ITEM SALES REPORT tracks which items are sold to loyalty customers within the date period



Report Options

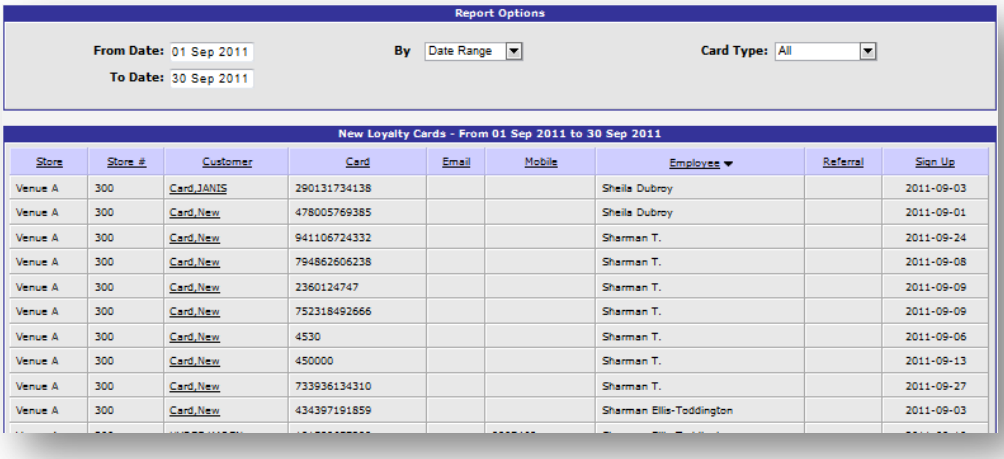
Options | Range

Store: All Date From: 16 Oct 2011 Date To: 18 Oct 2011

Loyalty Transaction Item Member Report

Description	Quantity	Bonus Points	Normal Points	Total Points	Sales Total
Points Redemption - Amount $6.70	1	0	-67	-67	$0.00
12oz Drip Coffee	12	0	25.8	25.8	$23.04
12oz Latte	7	0	28.7	28.7	$25.62
8oz Drip Coffee	6	0	7.8	7.8	$10.02
16oz Drip Coffee	6	0	14.4	14.4	$12.84
Turkey	5	0	44.75	44.75	$39.95

NEW CARDS REPORT tracks new members and which POS user signed up the member



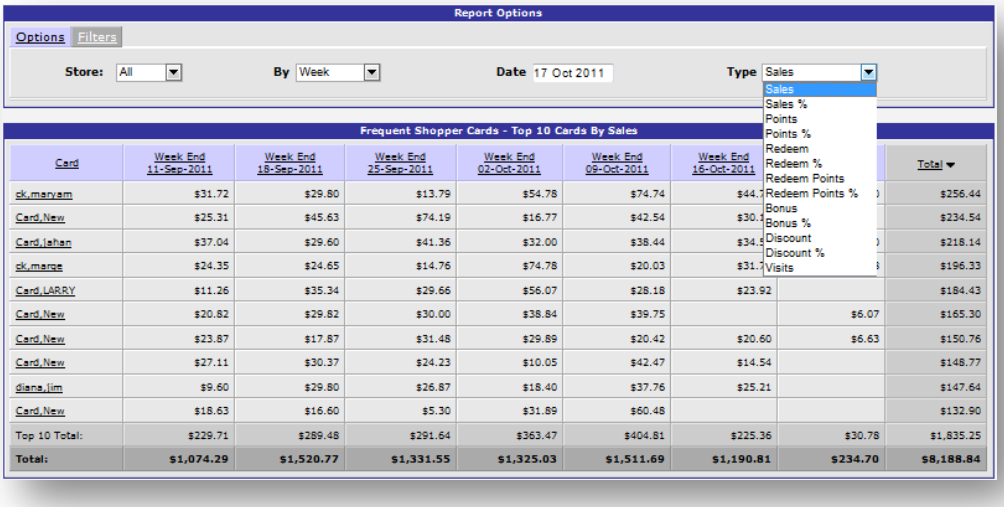
Report Options

From Date: 01 Sep 2011 To Date: 30 Sep 2011 By: Date Range Card Type: All

New Loyalty Cards - From 01 Sep 2011 to 30 Sep 2011

Store	Store #	Customer	Card	Email	Mobile	Employee	Referral	Sign Up
Venue A	300	Card,JANIS	290131734138			Sheila Dubroy		2011-09-03
Venue A	300	Card,New	478005769385			Sheila Dubroy		2011-09-01
Venue A	300	Card,New	941106724332			Sharman T.		2011-09-24
Venue A	300	Card,New	794862606238			Sharman T.		2011-09-08
Venue A	300	Card,New	2360124747			Sharman T.		2011-09-09
Venue A	300	Card,New	752318492666			Sharman T.		2011-09-09
Venue A	300	Card,New	4530			Sharman T.		2011-09-06
Venue A	300	Card,New	450000			Sharman T.		2011-09-13
Venue A	300	Card,New	733936134310			Sharman T.		2011-09-27
Venue A	300	Card,New	434397191859			Sharman Ellis-Toddington		2011-09-03

CARD HISTORY REPORT tracks members across different time periods and works as a ranking report, displaying the top customers for each field



Report Options

Options | Filters

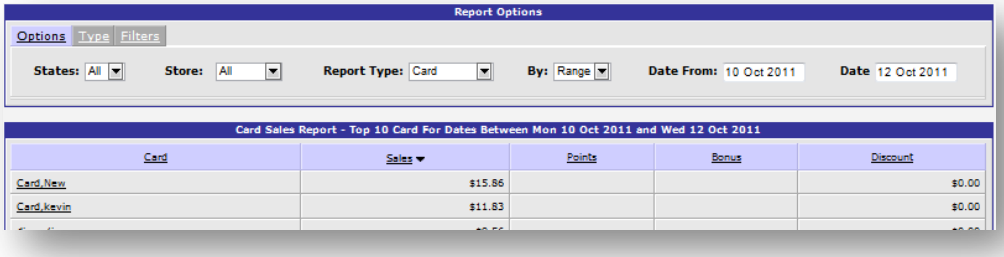
Store: All By: Week Date: 17 Oct 2011 Type: Sales

Sales, Sales %, Points, Points %, Redeem, Redeem %, Redeem Points, Redeem Points %, Bonus, Bonus %, Discount, Discount %, Visits

Frequent Shopper Cards - Top 10 Cards By Sales

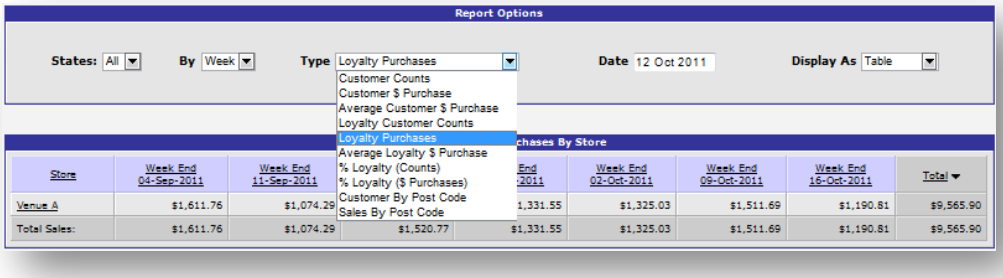
Card	Week End 11-Sep-2011	Week End 18-Sep-2011	Week End 25-Sep-2011	Week End 02-Oct-2011	Week End 09-Oct-2011	Week End 16-Oct-2011		Total
ck,maryam	$31.72	$29.80	$13.79	$54.78	$74.74	$44.1		$256.44
Card,New	$25.31	$45.63	$74.19	$16.77	$42.54	$30.1		$234.54
Card,jahan	$37.04	$29.60	$41.36	$32.00	$38.44	$34.5		$218.14
ck,marge	$24.35	$24.65	$14.76	$74.78	$20.03	$31.7		$196.33
Card,LARRY	$11.26	$35.34	$29.66	$56.07	$28.18	$23.92		$184.43
Card,New	$20.82	$29.82	$30.00	$38.84	$39.75		$6.07	$165.30
Card,New	$23.87	$17.87	$31.48	$29.89	$20.42	$20.60	$6.63	$150.76
Card,New	$27.11	$30.37	$24.23	$10.05	$42.47	$14.54		$148.77
diana,jim	$9.60	$29.80	$26.87	$18.40	$37.76	$25.21		$147.64
Card,New	$18.63	$16.60	$5.30	$31.89	$60.48			$132.90
Top 10 Total:	$229.71	$289.48	$291.64	$363.47	$404.81	$225.36	$30.78	$1,835.25
Total:	**$1,074.29**	**$1,520.77**	**$1,331.55**	**$1,325.03**	**$1,511.69**	**$1,190.81**	**$234.70**	**$8,188.84**

CARD SALES HISTORY is a very flexible report that can be used for customer rankings.
It can be narrowed down to individual member groupings and on specific product purchases

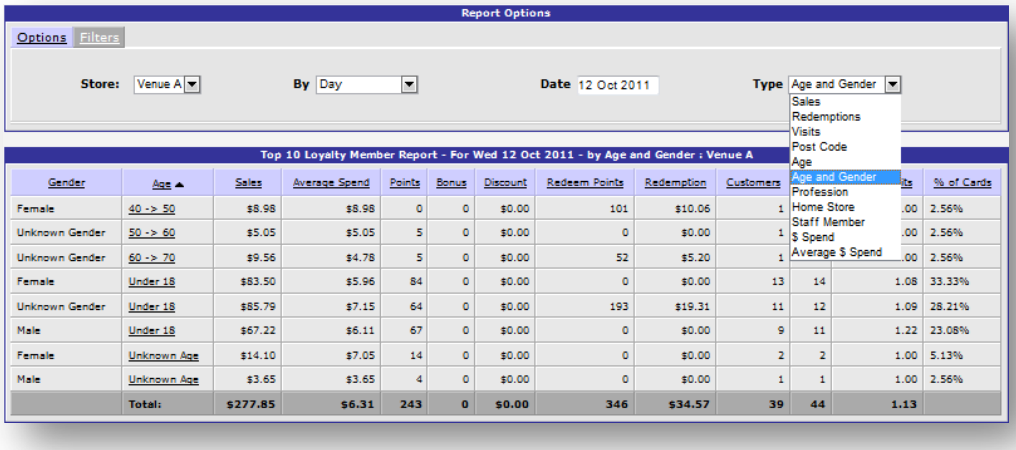

Report Options
Options Type Filters
States: All Store: All Report Type: Card By: Range Date From: 10 Oct 2011 Date 12 Oct 2011
Card Sales Report - Top 10 Card For Dates Between Mon 10 Oct 2011 and Wed 12 Oct 2011
Card Sales Points Bonus Discount
Card,New $15.86 $0.00
Card,kevin $11.83 $0.00

STATISTICS REPORTS

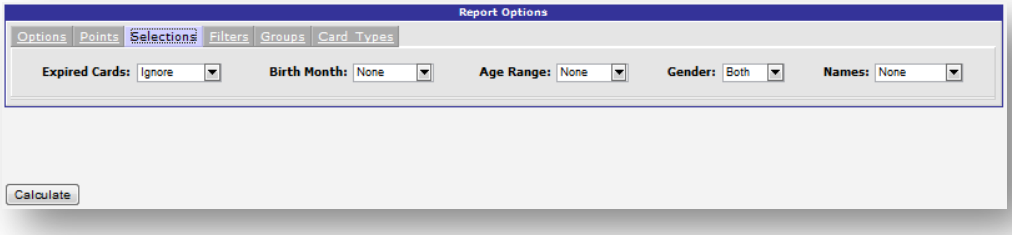
SALES REPORT is a consolidated report for sales across the venue(s). As per the drop down shown, the Sales report can track all venue sales, loyalty sales only, average customer spend, % of sales loyalty (as counts or amount purchased) and sales by postcode


Report Options
States: All By Week Type Loyalty Purchases Date 12 Oct 2011 Display As Table
Customer Counts
Customer $ Purchase
Average Customer $ Purchase
Loyalty Customer Counts
Loyalty Purchases
Average Loyalty $ Purchase
% Loyalty (Counts)
% Loyalty ($ Purchases)
Customer By Post Code
Sales By Post Code
Store Week End 04-Sep-2011 Week End 11-Sep-2011 Week End 02-Oct-2011 Week End 09-Oct-2011 Week End 16-Oct-2011 Total
Venue A $1,611.76 $1,074.29 $1,331.55 $1,325.03 $1,511.69 $1,190.81 $9,565.90
Total Sales: $1,611.76 $1,074.29 $1,520.77 $1,331.55 $1,325.03 $1,511.69 $1,190.81 $9,565.90

CARD REPORT captures a snap shot of your loyalty customers demographics. It can be used as a consolidated report or detailed report displaying individual members matching the selection


Report Options
Options Filters
Store: Venue A By Day Date 12 Oct 2011 Type Age and Gender
Sales
Redemptions
Visits
Post Code
Age
Age and Gender
Profession
Home Store
Staff Member
$ Spend
Average $ Spend
Top 10 Loyalty Member Report - For Wed 12 Oct 2011 - by Age and Gender : Venue A
Gender Age Sales Average Spend Points Bonus Discount Redeem Points Redemption Customers % of Cards
Female 40 -> 50 $8.98 $8.98 0 0 $0.00 101 $10.06 1 2.56%
Unknown Gender 50 -> 60 $5.05 $5.05 5 0 $0.00 0 $0.00 1 2.56%
Unknown Gender 60 -> 70 $9.56 $4.78 5 0 $0.00 52 $5.20 1 2.56%
Female Under 18 $83.50 $5.96 84 0 $0.00 0 $0.00 13 14 1.08 33.33%
Unknown Gender Under 18 $85.79 $7.15 64 0 $0.00 193 $19.31 11 12 1.09 28.21%
Male Under 18 $67.22 $6.11 67 0 $0.00 0 $0.00 9 11 1.22 23.08%
Female Unknown Age $14.10 $7.05 14 0 $0.00 0 $0.00 2 2 1.00 5.13%
Male Unknown Age $3.65 $3.65 4 0 $0.00 0 $0.00 1 1 1.00 2.56%
Total: $277.85 $6.31 243 0 $0.00 346 $34.57 39 44 1.13

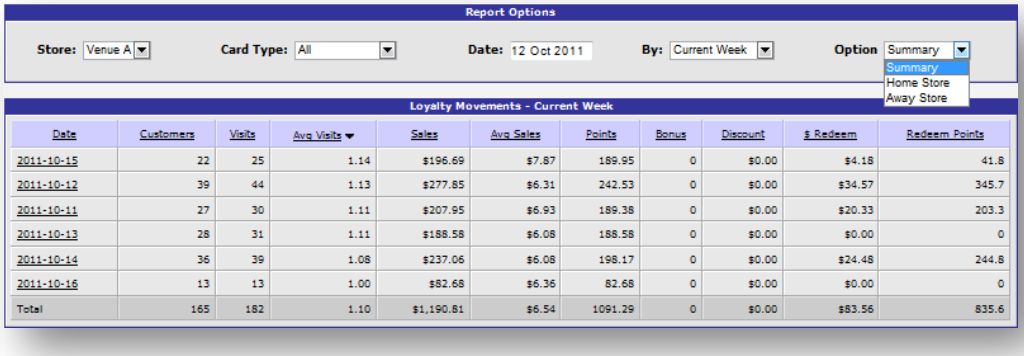
CARD FILTERED REPORT is used for segmenting the database based on information collected from your loyalty customers. It can also be used with **FILTERS**, to find members that have purchased specific products or made purchases at specific times.



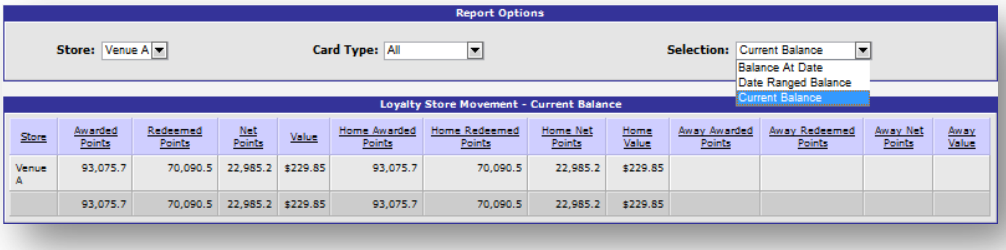
Once selections have been made, the report generates a list of customers you can view on screen, or download to a spreadsheet. Please see documentation on filters for more information on their use.

MOVEMENT REPORTS

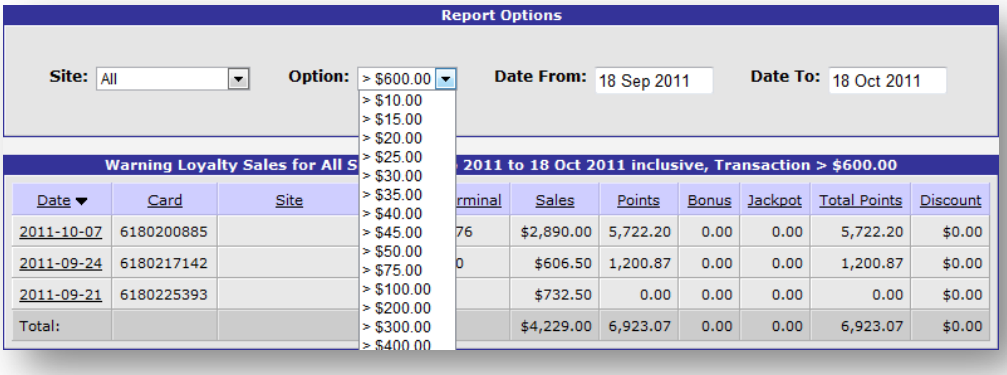
MOVEMENT REPORTS displays customer statistics within a time period with sales, average sales, points, redemptions etc. Particularly useful for a company with multiple sites. It starts as a consolidated report, however, selecting a period within the first column, drills down to individual loyalty customers, their purchases, redemptions and average spends



SITE MOVEMENTS REPORT monitors points liability. It shows points awarded, redeemed, net points, and their value. It can also be used to display historical balances on specific dates



WARNINGS REPORT is designed to report on high value transactions and warn against potential misuse of the loyalty system



MARKETING

SUB MENU ITEM WITHIN THE CUSTOMERS MENU:

This section holds databases of non-card holding member, Loyalty members who have completed a survey questionnaire and customers who have signed up online but have not activated their card:

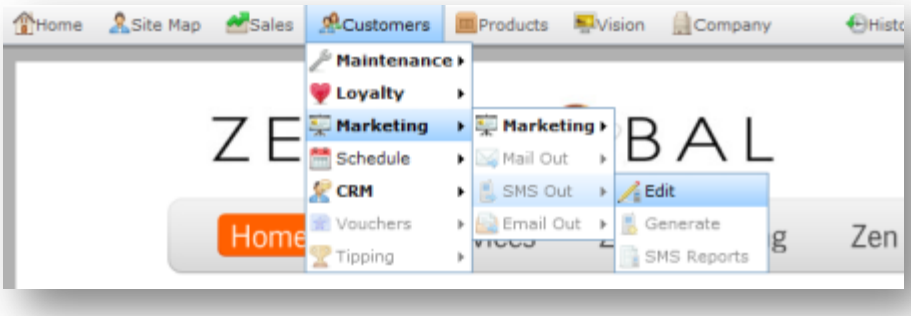
FIND A RECORD

MENU NAVIGATION: CUSTOMERS ⇒ MARKETING ⇒ MARKETING ⇒ EDIT MEMBER

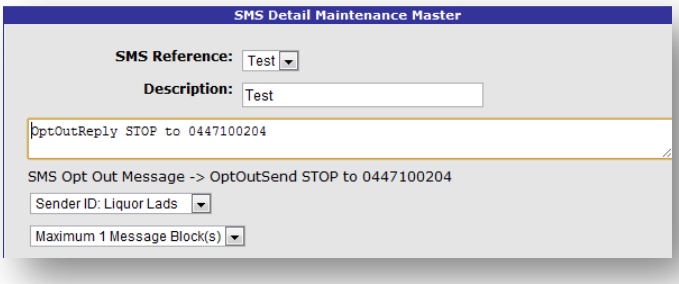
Search for the customer and edit them accordingly ensure you select **UPDATE** to save data.
You can also add a new member to marketing by the following steps:
MENU NAVIGATION: CUSTOMERS ⇒ MARKETING ⇒ MARKETING ⇒ NEW CUSTOMER

SMS – CREATE A SMS

MENU NAVIGATION: CUSTOMERS ⇒ MARKETING ⇒ SMS OUT ⇒ EDIT



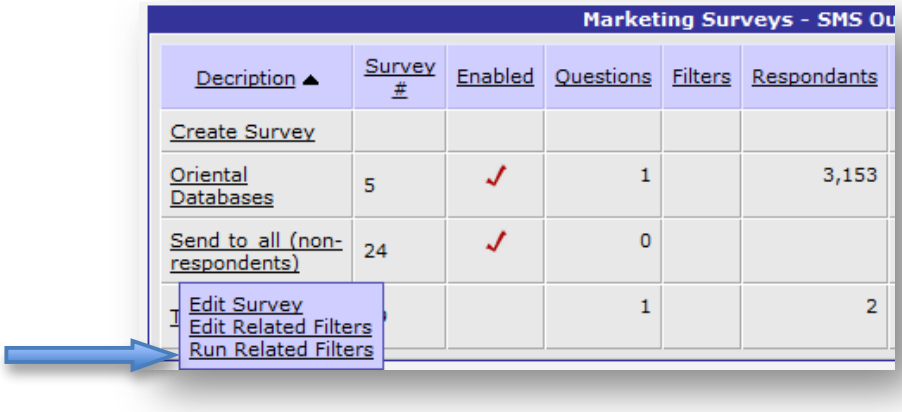
STEP 1 A pre existing SMS message will open, click **NEW**
STEP 2 In the **DESCRIPTION** field title your SMS for your reference
STEP 3 Enter your message before the <<STOP>>
DO NOT remove the <<STOP>> this is the automated opt out required for privacy
STEP 4 Select **SAVE** to complete the process


SMS Detail Maintenance Master
SMS Reference: Test
Description: Test
OptOutReply STOP to 0447100204
SMS Opt Out Message -> OptOutSend STOP to 0447100204
Sender ID: Liquor Lads
Maximum 1 Message Block(s)

SMS – SEND AN SMS

Marketing sends need to be sent via a survey. There are two options for the send.
OPTION 1 **DATABASES** OPTION 2 **SEND TO ALL (NON-RESPONDENTS)**

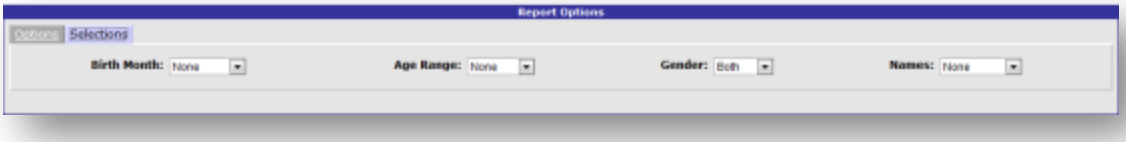
STEP 1 Select one of the two options and select **RUN RELATED FILTERS** from the list



STEP 2 Select the send fields as follows:

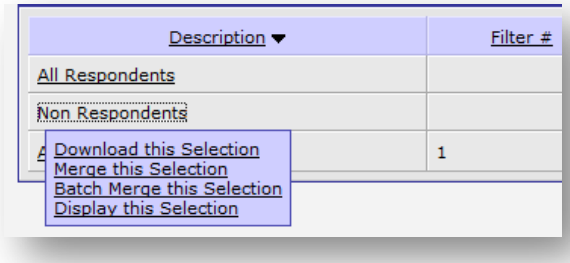
Options: Opt in SMS
Merge Forms: Reference name of the SMS you wish to send
Job Number: Select **NEW JOB.** Using an old job number will resend a past message
Site: Leave **ALL** or select your venue from the drop down list

NOTE: The Selections tab found at the top, can be used to narrow down the database



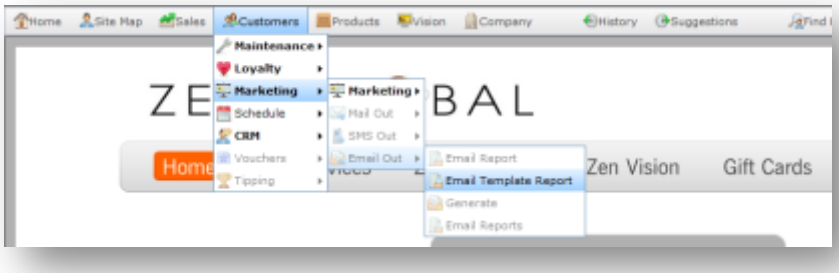
STEP 3 Click on your selection of either;
ALL RESPONDENTS - Anyone who **HAS** answered the survey
NON RESPONDENTS - Anyone who **HASN'T** answered the survey
OTHER FILTERS - Created for specific groups

STEP 4 Select one of the 4 options; **DOWNLOAD THIS SELECTION**, **MERGE THIS SELECTION** *(Send Now)*, **BATCH MERGE THIS SELECTION** *(Send Later)* or **DISPLAY THIS SELECTION**



EMAIL – CREATE AND SEND

MENU NAVIGATION: CUSTOMERS ⇒ MARKETING ⇒ EMAIL OUT ⇒ EMAIL REPORT/TEMPLATE REPORT



STEP 1 Select the email template you wish to use by selecting the **TEMPLATES NAME**

STEP 2 Email editor will open, rename the email in the **DESCRIPTION** field at the top

STEP 2 Enter the tagline into the **SUBJECT LINE** field then select **SAVE/SAVE EMAIL**
You cannot save an email until both the above fields are complete

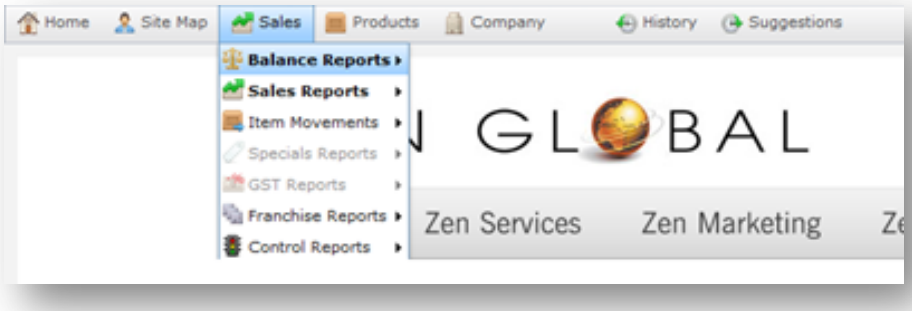
STEP 3 Now you can design your email using the editor functions

STEP 4 Send email – Follow the same process as **MARKETING SMS SEND** detailed previously

SALES MENU

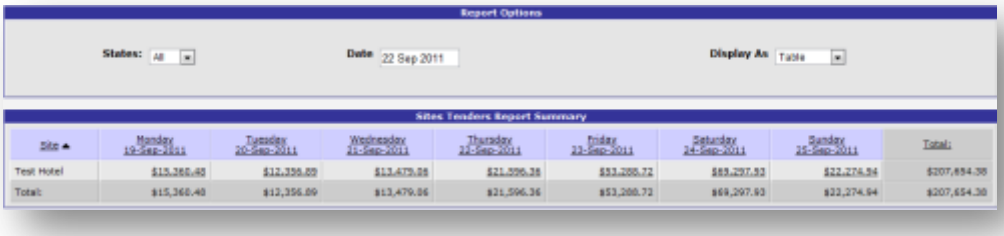
ZEN SALES REPORTS

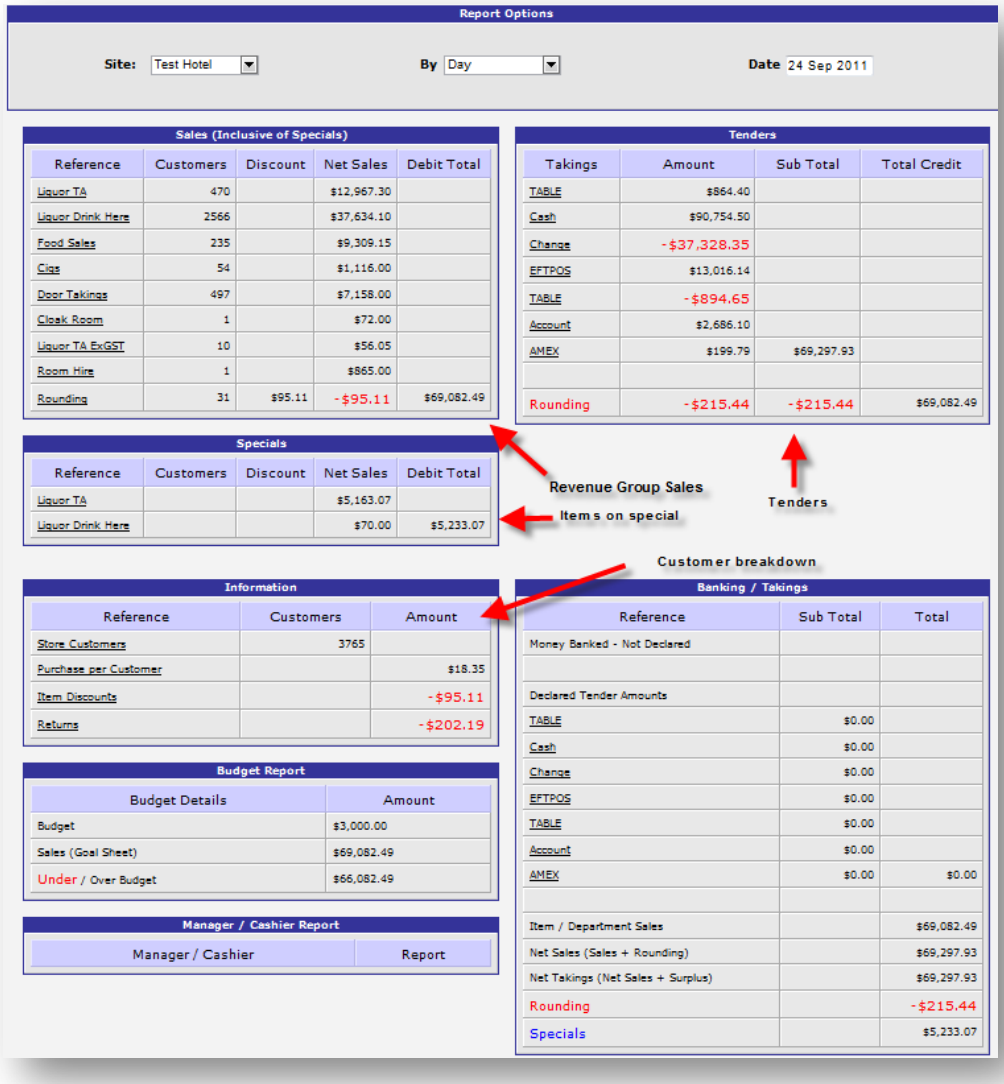
Sales reports include both loyalty and non-loyalty sales



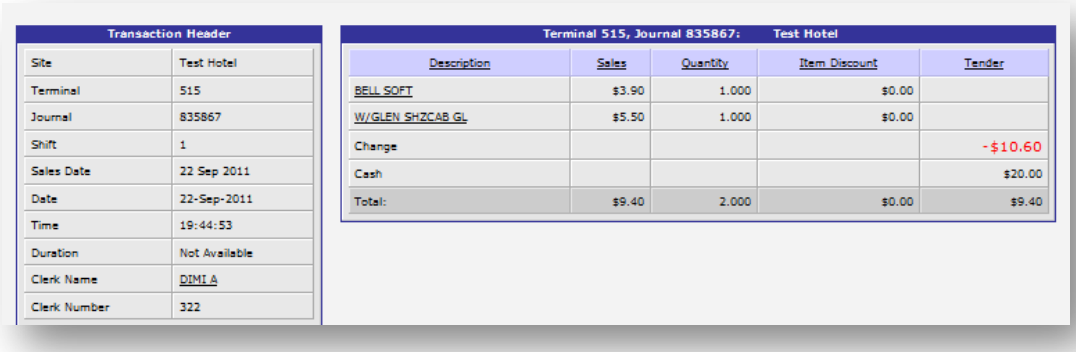
BALANCE REPORTS

SITE BALANCES displays the sales balance for venue(s) on any given day. By clicking on a specific day, additional details will be viewable for your selection





SITE JOURNALS allows specific transaction searches on a specific day



Transaction Header

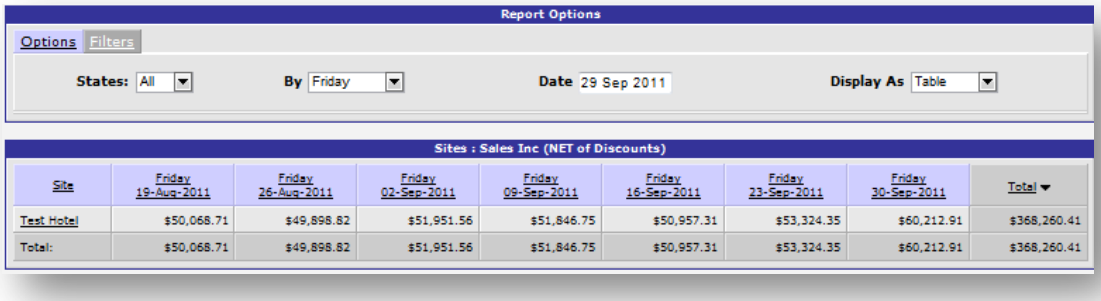
Site	Test Hotel
Terminal	515
Journal	835867
Shift	1
Sales Date	22 Sep 2011
Date	22-Sep-2011
Time	19:44:53
Duration	Not Available
Clerk Name	DIMI A
Clerk Number	322

Terminal 515, Journal 835867: Test Hotel

Description	Sales	Quantity	Item Discount	Tender
BELL SOFT	$3.90	1.000	$0.00	
W/GLEN SHZCAB GL	$5.50	1.000	$0.00	
Change				-$10.60
Cash				$20.00
Total:	$9.40	2.000	$0.00	$9.40

SALES REPORTS

SALES is a flexible report showing sales for day on day, week on week, month on month, etc



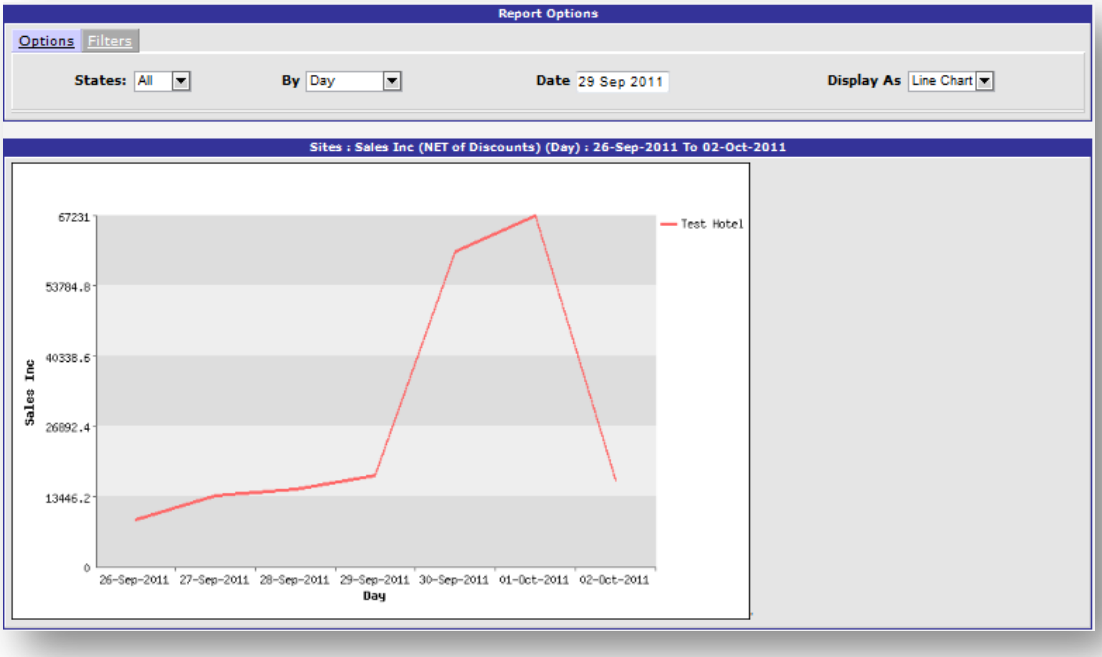
Report Options

Options Filters

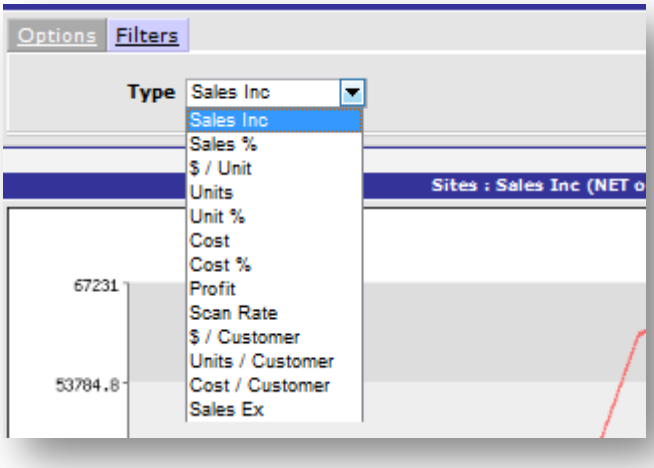
States: All By Friday Date 29 Sep 2011 Display As Table

Sites : Sales Inc (NET of Discounts)

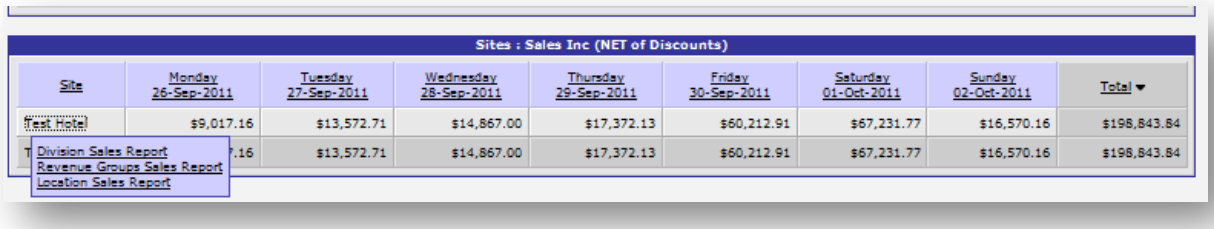
Site	Friday 19-Aug-2011	Friday 26-Aug-2011	Friday 02-Sep-2011	Friday 09-Sep-2011	Friday 16-Sep-2011	Friday 23-Sep-2011	Friday 30-Sep-2011	Total
Test Hotel	$50,068.71	$49,898.82	$51,951.56	$51,846.75	$50,957.31	$53,324.35	$60,212.91	$368,260.41
Total:	$50,068.71	$49,898.82	$51,951.56	$51,846.75	$50,957.31	$53,324.35	$60,212.91	$368,260.41



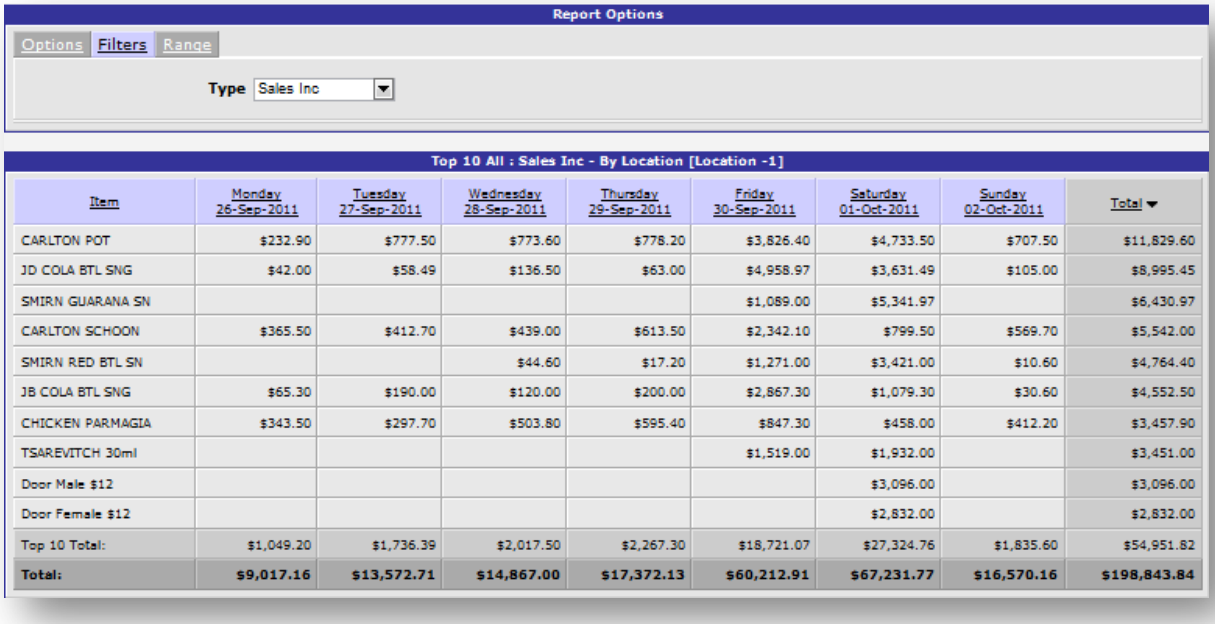
The FILTERS TAB allows you to show different figures within the report



Clicking on the SITE NAME allows you to break the report down into revenue group, sales or location sales

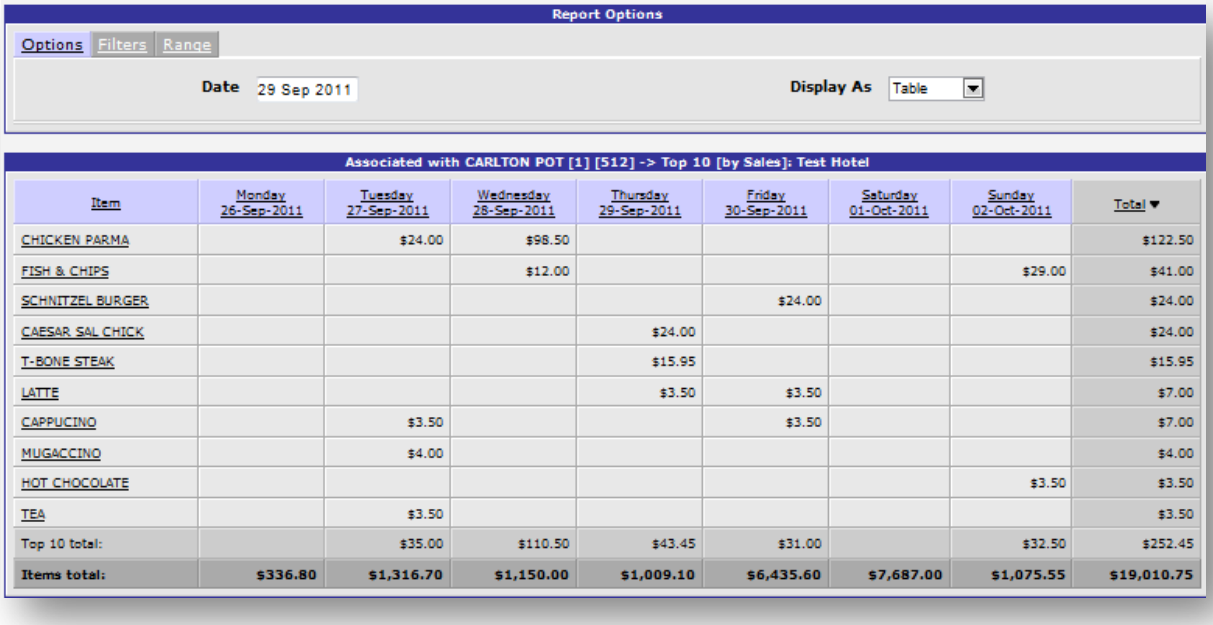


ITEM SALES list items sold on a particular day. This report can also be broken down by locations or revenue groups and can show data for sales inc, sales ex, units, cost etc.



Item	Monday 26-Sep-2011	Tuesday 27-Sep-2011	Wednesday 28-Sep-2011	Thursday 29-Sep-2011	Friday 30-Sep-2011	Saturday 01-Oct-2011	Sunday 02-Oct-2011	Total
CARLTON POT	$232.90	$777.50	$773.60	$778.20	$3,826.40	$4,733.50	$707.50	$11,829.60
JD COLA BTL SNG	$42.00	$58.49	$136.50	$63.00	$4,958.97	$3,631.49	$105.00	$8,995.45
SMIRN GUARANA SN					$1,089.00	$5,341.97		$6,430.97
CARLTON SCHOON	$365.50	$412.70	$439.00	$613.50	$2,342.10	$799.50	$569.70	$5,542.00
SMIRN RED BTL SN			$44.60	$17.20	$1,271.00	$3,421.00	$10.60	$4,764.40
JB COLA BTL SNG	$65.30	$190.00	$120.00	$200.00	$2,867.30	$1,079.30	$30.60	$4,552.50
CHICKEN PARMAGIA	$343.50	$297.70	$503.80	$595.40	$847.30	$458.00	$412.20	$3,457.90
TSAREVITCH 30ml					$1,519.00	$1,932.00		$3,451.00
Door Male $12						$3,096.00		$3,096.00
Door Female $12						$2,832.00		$2,832.00
Top 10 Total:	$1,049.20	$1,736.39	$2,017.50	$2,267.30	$18,721.07	$27,324.76	$1,835.60	$54,951.82
Total:	**$9,017.16**	**$13,572.71**	**$14,867.00**	**$17,372.13**	**$60,212.91**	**$67,231.77**	**$16,570.16**	**$198,843.84**

ASSOCIATED ITEMS REPORT allows you to select a product and see what other items have been purchased with it, within a time frame - this is a handy basket analysis tool that can help with future promotions etc.



Report Options

Options | Filters | Range

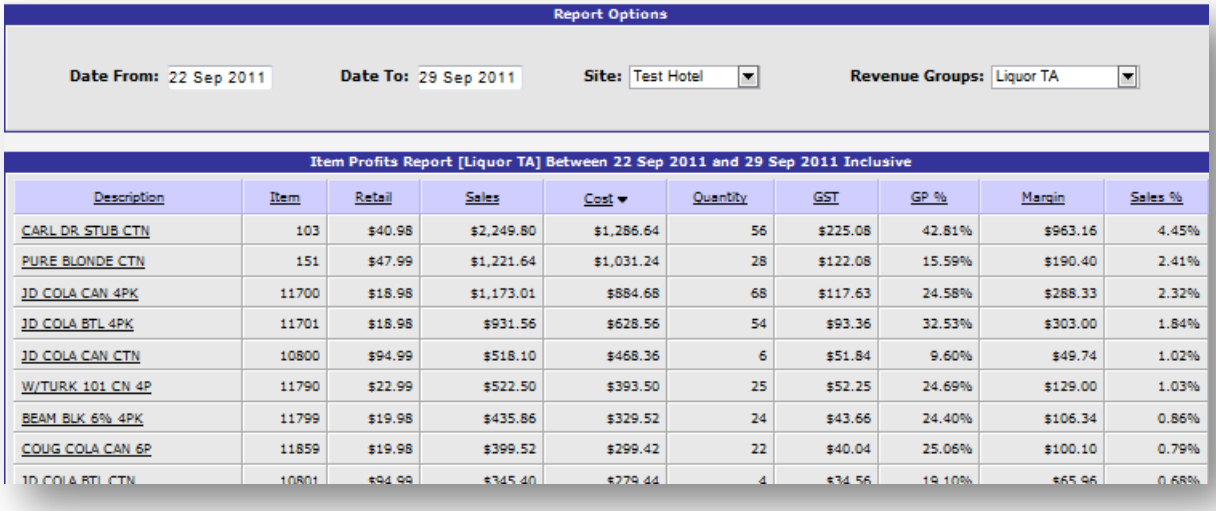
Date 29 Sep 2011 Display As Table

Associated with CARLTON POT [1] [512] -> Top 10 [by Sales]: Test Hotel

Item	Monday 26-Sep-2011	Tuesday 27-Sep-2011	Wednesday 28-Sep-2011	Thursday 29-Sep-2011	Friday 30-Sep-2011	Saturday 01-Oct-2011	Sunday 02-Oct-2011	Total
CHICKEN PARMA		$24.00	$98.50					$122.50
FISH & CHIPS			$12.00				$29.00	$41.00
SCHNITZEL BURGER					$24.00			$24.00
CAESAR SAL CHICK				$24.00				$24.00
T-BONE STEAK				$15.95				$15.95
LATTE				$3.50	$3.50			$7.00
CAPPUCINO		$3.50			$3.50			$7.00
MUGACCINO		$4.00						$4.00
HOT CHOCOLATE							$3.50	$3.50
TEA		$3.50						$3.50
Top 10 total:		$35.00	$110.50	$43.45	$31.00		$32.50	$252.45
Items total:	**$336.80**	**$1,316.70**	**$1,150.00**	**$1,009.10**	**$6,435.60**	**$7,687.00**	**$1,075.55**	**$19,010.75**

ITEM MOVEMENTS

ITEM PROFITS REPORT Lists items sold in a particular period and the profit made



Report Options

Date From: 22 Sep 2011 Date To: 29 Sep 2011 Site: Test Hotel Revenue Groups: Liquor TA

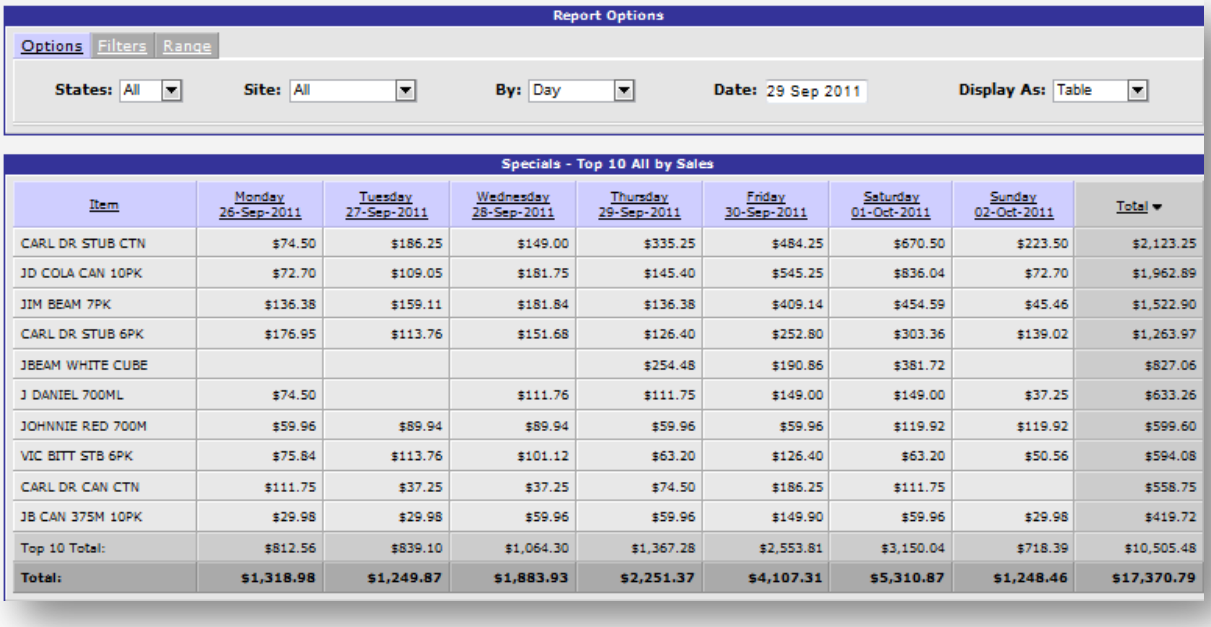
Item Profits Report [Liquor TA] Between 22 Sep 2011 and 29 Sep 2011 Inclusive

Description	Item	Retail	Sales	Cost	Quantity	GST	GP %	Margin	Sales %
CARL DR STUB CTN	103	$40.98	$2,249.80	$1,286.64	56	$225.08	42.81%	$963.16	4.45%
PURE BLONDE CTN	151	$47.99	$1,221.64	$1,031.24	28	$122.08	15.59%	$190.40	2.41%
JD COLA CAN 4PK	11700	$18.98	$1,173.01	$884.68	68	$117.63	24.58%	$288.33	2.32%
JD COLA BTL 4PK	11701	$18.98	$931.56	$628.56	54	$93.36	32.53%	$303.00	1.84%
JD COLA CAN CTN	10800	$94.99	$518.10	$468.36	6	$51.84	9.60%	$49.74	1.02%
W/TURK 101 CN 4P	11790	$22.99	$522.50	$393.50	25	$52.25	24.69%	$129.00	1.03%
BEAM BLK 6% 4PK	11799	$19.98	$435.86	$329.52	24	$43.66	24.40%	$106.34	0.86%
COUG COLA CAN 6P	11859	$19.98	$399.52	$299.42	22	$40.04	25.06%	$100.10	0.79%
JD COLA BTL CTN	10801	$94.99	$345.40	$279.44	4	$34.56	19.10%	$65.96	0.68%

SPECIALS REPORT

SALES REPORT displays items that have been flagged in H&L as being 'on special' as a combined report

ITEM SALES will show you a breakdown by item



Report Options

Options | Filters | Range

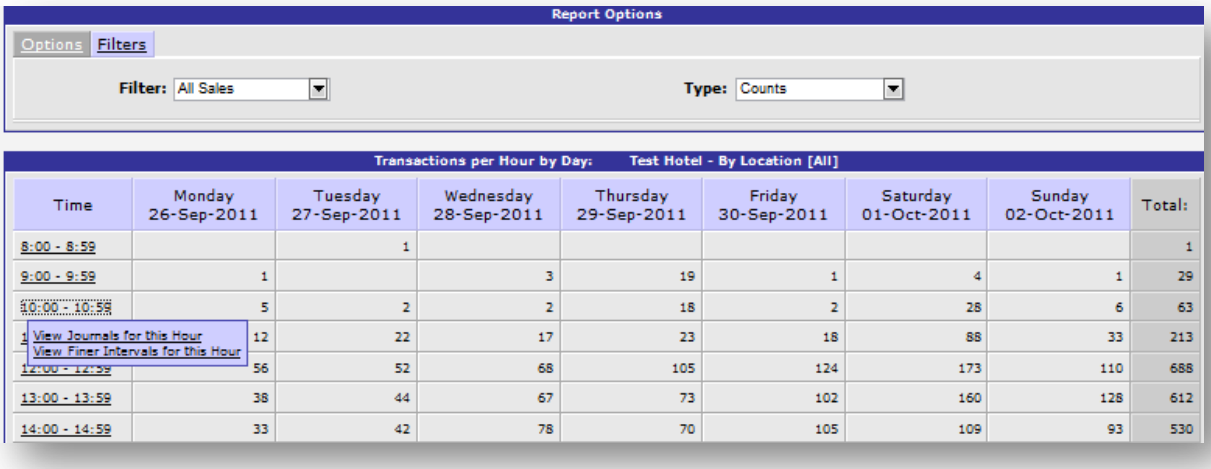
States: All | Site: All | By: Day | Date: 29 Sep 2011 | Display As: Table

Specials - Top 10 All by Sales

Item	Monday 26-Sep-2011	Tuesday 27-Sep-2011	Wednesday 28-Sep-2011	Thursday 29-Sep-2011	Friday 30-Sep-2011	Saturday 01-Oct-2011	Sunday 02-Oct-2011	Total
CARL DR STUB CTN	$74.50	$186.25	$149.00	$335.25	$484.25	$670.50	$223.50	$2,123.25
JD COLA CAN 10PK	$72.70	$109.05	$181.75	$145.40	$545.25	$836.04	$72.70	$1,962.89
JIM BEAM 7PK	$136.38	$159.11	$181.84	$136.38	$409.14	$454.59	$45.46	$1,522.90
CARL DR STUB 6PK	$176.95	$113.76	$151.68	$126.40	$252.80	$303.36	$139.02	$1,263.97
JBEAM WHITE CUBE				$254.48	$190.86	$381.72		$827.06
J DANIEL 700ML	$74.50		$111.76	$111.75	$149.00	$149.00	$37.25	$633.26
JOHNNIE RED 700M	$59.96	$89.94	$89.94	$59.96	$59.96	$119.92	$119.92	$599.60
VIC BITT STB 6PK	$75.84	$113.76	$101.12	$63.20	$126.40	$63.20	$50.56	$594.08
CARL DR CAN CTN	$111.75	$37.25	$37.25	$74.50	$186.25	$111.75		$558.75
JB CAN 375M 10PK	$29.98	$29.98	$59.96	$59.96	$149.90	$59.96	$29.98	$419.72
Top 10 Total:	$812.56	$839.10	$1,064.30	$1,367.28	$2,553.81	$3,150.04	$718.39	$10,505.48
Total:	**$1,318.98**	**$1,249.87**	**$1,883.93**	**$2,251.37**	**$4,107.31**	**$5,310.87**	**$1,248.46**	**$17,370.79**

CONTROL REPORT

STATISTICS - **TIME HOUR** gives a breakdown of sales throughout the day. This report can show count, quantities, sales etc. Clicking on the hour allows further drill down into either viewing finer intervals (15 minutes), or show the individual transactions within the hour.



Report Options

Options | Filters

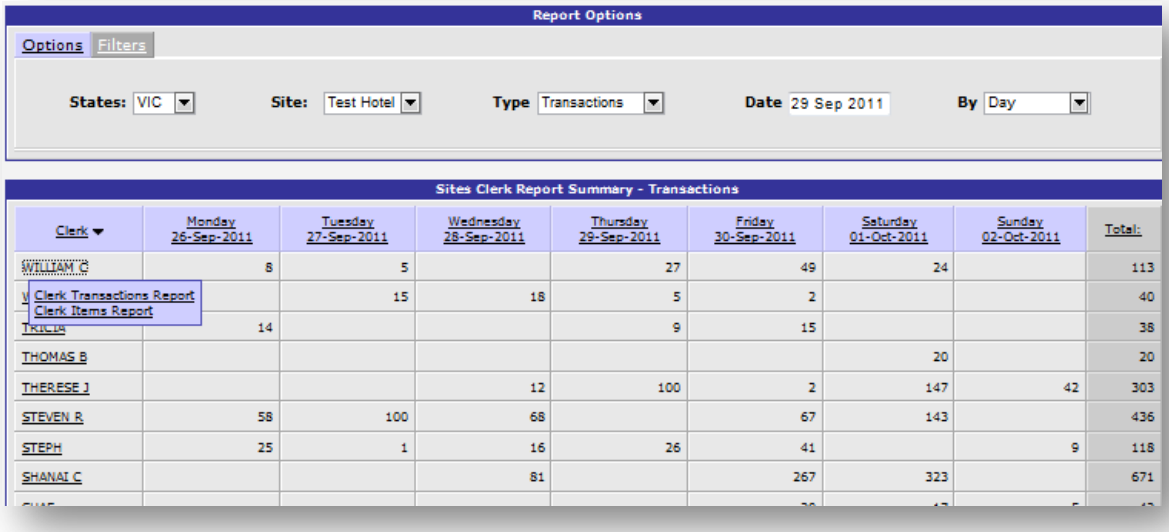
Filter: All Sales | Type: Counts

Transactions per Hour by Day: Test Hotel - By Location [All]

Time	Monday 26-Sep-2011	Tuesday 27-Sep-2011	Wednesday 28-Sep-2011	Thursday 29-Sep-2011	Friday 30-Sep-2011	Saturday 01-Oct-2011	Sunday 02-Oct-2011	Total:
8:00 - 8:59		1						1
9:00 - 9:59	1		3	19	1	4	1	29
10:00 - 10:59	5	2	2	18	2	28	6	63
11:00 - 11:59	12	22	17	23	18	88	33	213
12:00 - 12:59	56	52	68	105	124	173	110	688
13:00 - 13:59	38	44	67	73	102	160	128	612
14:00 - 14:59	33	42	78	70	105	109	93	530

View Journals for this Hour
View Finer Intervals for this Hour

POS REPORTS- **CLERK TRANSACTIONS** shows sales for individual POS users. Clicking on the user allows you to drill down to individual clerk transactions, or display the items they have been selling



CUSTOMISATION

FAVOURITE GROUPS

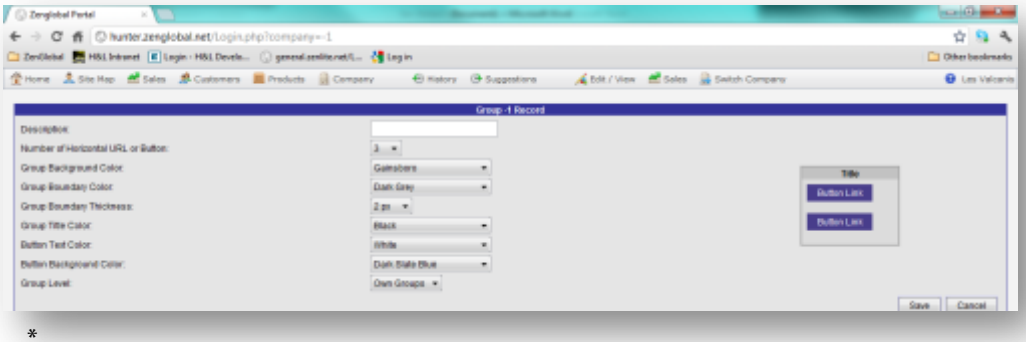
Favourite Groups allow quick and easy access to the reports you use most frequently. Favourite Groups can be created for a variety of portal functions or reports e.g. Loyalty Functions or Weekly Sales.

MENU NAVIGATION: COMPANY ⇒ USERS ⇒ PORTAL USERS ⇒ USER REPORT

STEP 1 In your user profile, select **SECURITY** tab and change the **DEFAULT LOGIN SCREEN** to **FAVOURITE REPORTS** and **SAVE**

STEP 2 Select your favourite groups **MENU NAVIGATION:** COMPANY ⇒ USERS ⇒ PORTAL USERS ⇒ FAVOURITE GROUPS and select **ENTER NEW GROUP**

STEP 3 Enter Group Description and choose colour and layout formats



***G**

ROUP LEVEL indicates which other users will have access to the Favourites Reports. i.e. Own Groups indicates only you have access to those reports. If you select **COMPANY** and then the type of user (e.g. Company Administrator), only these users will see the report.

STEP 4 Select a Report or Function you would like to save in your Favourites Group

On the lower left hand side of the screen, there is a link to create the report you are viewing as a favourite **ADD THIS REPORT TO FAVOURITES**

STEP 5 Click on **HOME** and the **FAVOURITES GROUPS** you just created should appear

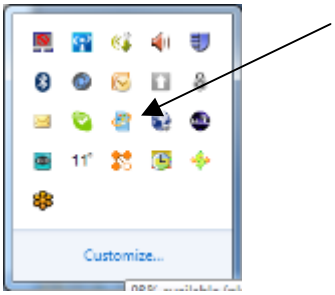
To DELETE REPORTS, **MENU NAVIGATION:** COMPANY ⇒ USERS ⇒ PORTAL USERS ⇒ FAVOURITES and select the report you wish to delete.

SUPPORT

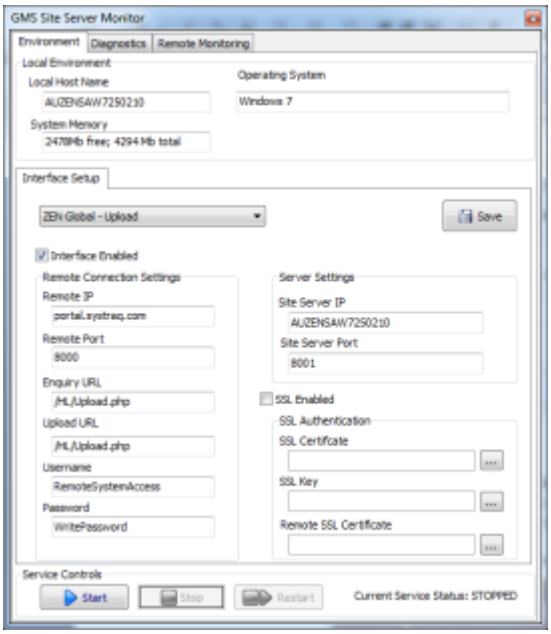
OFFLINE MODE

If the system goes into **OFFLINE MODE**, details of the customer will not be displayed at POS. You will see a message at the top and bottom of the screen saying "Offline" (e.g. – 6194975359– [Offline])

The **FIRST CHECK** made is on the GMS site server that connects the POS to the internet. This is found by double clicking the blue circular icon in your tool bar on server computer (where transaction server runs)



You can then check if it is online· if it is stopped, you can restart and reconnection will be achieved



If this doesn't work, check whether the network has gone down. If you still have internet and network connection, check to see if the H&L transaction server is running. If this is not the case, the manager on duty needs to contact the H&L helpdesk 1300SYSNET (1300·797·638). If you find only one of your POS is down, then check your network cables.

For other portal issues or assistance in SMS and email sends, please contact a Zen representative at H&L Australia on 08 8291 9550